



State of New Jersey
Division of Revenue and Enterprise Services

Letter of Intent

Tax Year 2020

James J. Fruscione
Director

2020 Tax Software Provider NJ DORES Letter of Intent

By submitting this Letter of Intent (LOI) to the State of New Jersey Division of Revenue and Enterprise Services (DORES), you are agreeing to meet our standards for software provider registration, all tax preparation software, and substitute forms.

Failure to meet the standards or requirements set forth in this LOI may result in the denial of your application or the removal of your organization as an approved software provider, and the rejection of all electronic or paper returns submitted using your products.

You must complete a separate LOI form for each unique product your company offers. If you submit an incomplete form, your request to participate in electronic submissions may be denied.

This form must be completed and submitted to e-GovServices@treas.nj.gov no later than 1/11/2021

Name of Company	Product Name	State Software ID
DBA Name	NACTP Member Number	State Tax Account Number (if applicable)
Address	Product Address/URL	Company FEIN
City	State	Zip Code
Regulatory/Compliance Contact	Phone	Email Address
Primary Individual MeF Contact	Phone	Email Address
Secondary Individual MeF Contact	Phone	Email Address
Primary Business MeF Contact	Phone	Email Address
Secondary Business MeF Contact	Phone	Email Address
Primary Leads Reporting Contact	Phone	Email Address
Secondary Leads Reporting Contact	Phone	Email Address
Test EFIN(s)	Test ETIN(s)	
Production EFIN(s)	Production ETIN(s)	

Type of software product

- DIY/Consumer (Web-Based)
- DIY/Consumer (Desktop)

- Professional/Paid Preparer (Web-Based)
- Professional/Paid Preparer (Desktop)

Tax types supported

Please check all that apply

- | | | |
|--------------------------|--------------------------|----------------------------|
| Forms | E-File | |
| <input type="checkbox"/> | <input type="checkbox"/> | Individual Income Tax |
| <input type="checkbox"/> | <input type="checkbox"/> | Property Tax |
| <input type="checkbox"/> | <input type="checkbox"/> | Estate/Trust/Fiduciary Tax |
| <input type="checkbox"/> | <input type="checkbox"/> | Partnership Tax |

- | | | |
|--------------------------|--------------------------|---------------------------------|
| Forms | E-File | |
| <input type="checkbox"/> | <input type="checkbox"/> | Corporate/Franchise Tax |
| <input type="checkbox"/> | <input type="checkbox"/> | S-Corporation Return |
| <input type="checkbox"/> | <input type="checkbox"/> | Unitary Corporate Return |
| <input type="checkbox"/> | <input type="checkbox"/> | Insurance Premium Tax |
| <input type="checkbox"/> | <input type="checkbox"/> | Pass-Through Partnership/S-Corp |

Rebranded software products

Complete this section only if your product is rebranded.

In order for the software to be considered rebranded, changes cannot be made to the software requirements and output(s). As the Software company selling and/or licenses your product to a third-party, it is your responsibility to make sure the rebranded product reflects the current software requirements and output(s). Enter the appropriate class code for the rebranded product in class code box below.

- **Class Code 1:** Software products sold/licensed to a third-party user and the third-party user has the ability to add their own logos and/or splash screens. They cannot modify calculations in the program.
- **Class Code 2:** Software products sold/licensed to a third-party user and the third-party has the ability to alter/change calculations in the program.

Rebranded Product Name	Class Code	ETIN (if applicable)	Contact Person	Phone	Email Address
Rebranded Product Name	Class Code	ETIN (if applicable)	Contact Person	Phone	Email Address
Rebranded Product Name	Class Code	ETIN (if applicable)	Contact Person	Phone	Email Address
Rebranded Product Name	Class Code	ETIN (if applicable)	Contact Person	Phone	Email Address
Rebranded Product Name	Class Code	ETIN (if applicable)	Contact Person	Phone	Email Address

For Rebranded Products, State of New Jersey Division of Revenue and Enterprise Services have the following requirements for e-file ATS approval

- Rebranded Products with a Class Code 1 are required to complete an abbreviated e-file ATS approval process
- Rebranded Products with a Class Code 2 are required to complete the full e-file ATS approval process

Substitute forms registration

Complete this section only if your product will provide substitute forms.

Agency Substitute Form Vendor Number		
Primary Individual Forms Contact	Phone	Email Address
Secondary Individual Forms Contact	Phone	Email Address
Primary Business Forms Contact	Phone	Email Address
Secondary Business Forms Contact	Phone	Email Address
<p>Note: If you have separate contacts for each business tax type, please list them by tax type on a separate sheet and attach it to this submission.</p>		

Forms and schedules supported (check all that apply)

Use the section below to list forms and schedules.

NJ1040

Returns/Schedules		Returns/Schedules
NJ1040		NJ1041
NJ1040NR		NJ1041SB
NJ1040X		NJ2210
Schedule NJ-COJ		NJ-NRA
Schedule NJ DOP		Schedule- A
NJ2210		Schedule- A - SB
NJ2450		Schedule- B
NJW2		Schedule- B - SB
NJ-NRA		Schedule- C
Schedule- BUS-1		Schedule- C - SB
Schedule- BUS-2		Schedule- D
Schedule- BUS-1NR		Schedule- E
NJCBTK1		Schedule- E - SB
NJ1065K1		Schedule- G
Worksheet A		NJ1041K1
Worksheet B		NJSBK1
Worksheet C		NJ630
NJ630		NJ1041ES
NJ1040ES		Schedule- BUS-1
Schedule NJ WWC		Schedule- BUS-2
Schedule NJ HCC		
NJ2210NR		

NJ Corporate Business Tax

- Due to continuously changing legislation, there may be additional forms/schedules added for the upcoming tax season. By checking this box you are stating that you are willing to support these updates/changes for the CBT family of forms.

Returns/Schedules		Forms	
CBT100		Form 300	
CBT100S		Form 301	
CBT 100U		Form 302	
Schedule A		Form 303	
Schedule A-S		Form 304	
Schedule A-2		Form 305	
Schedule A-3		Form 306	
Schedule A-4		Form 308	
Schedule A-5		Form 310	
Schedule A-GR		Form 311	
Schedule AM		Form 312	
Schedule B		Form 313	
Schedule B-S		Form 315	
Schedule C		Form 316	
Schedule C-1		Form 317	
Schedule CBTK1		Form 318	
Schedule E		Form 319	
Schedule E-S		Form 320	
Schedule F		Form 321	
Schedule F-S		Form 322	
Schedule G		Form 323	
Schedule H		Form 324	
Schedule J		Form 325	
Schedule KL		Form 401	
Schedule K		Form 500	
Schedule K-S		Form 501	
Schedule M		Schedule G-2	
Schedule P		Schedule N	
Schedule P-1		Schedule O	
Schedule PC		Worksheet GIT-DEP	
Schedule Q		CBT150	
Schedule Q-S		CBT200T	
Schedule R		Annual Report	
Schedule S		PTE200T	
PTE100		Schedule PTEK1	
PTE150		Schedule MD	

NJ Partnership

Returns/Schedules		
NJ1065		PTE100
CBT1065		PTE150
CBT160		PTE200T
PART 200T		Schedule PTEK1
NJ1065E		Schedule MD
Schedule- A		
Schedule- B		
Schedule- J		
Schedule- L		
Schedule- PD		
Schedule- T		
NJ1065K1		
NJ-NRA		
Worksheet GITEP		
NJ1065ES		

Agency requirements

This section identifies agency requirements expectations for communicating information to users of the software product.

Issue notification and resolution requirements

This section represents the State of New Jersey Division of Revenue and Enterprise Services issue notification and issue resolution standards.

- If there is an issue with any of the above software packages, State of New Jersey Division of Revenue and Enterprise Services must be contacted about the issue. The issue must be corrected in a timely manner.
- If State of New Jersey Division of Revenue and Enterprise Services finds an issue with any of the above software, you will be contacted and the issue must be corrected in a timely manner.

Production return submission requirements

All returns generated from this software must be electronically filed or printed from the initially approved software or a subsequent product update.

Product update requirements

Users/customers of desktop products who attempt to file 10 or more business days after a production release, must be required to download and apply the product update.

Schema requirements

Your software must adhere to the schema requirements included in the authentication and return header. Agency schema information and requirements can be found :

- State of New Jersey Web Portal
 - <https://my.state.nj.us/openam/UI/Login>

Testing and submission requirements

All e-file ATS and substitute forms tests submitted during the approval process must be created in, and originate from, the actual software.

System security requirements

You are responsible for implementing appropriate security measures to protect taxpayers and their information in your system. This includes but is not limited to when it is on-line, off-line, at rest, and in transit. The State of New Jersey Division of Revenue and Enterprise Services does not prescribe the security requirements for your system. Cyber security resources such as the National Institute of Standards and Technology or the Department of Defense Security Technical Implementation Guide are examples of national resources available to assist you with this process.

Customer Communications

This section identifies information State of New Jersey Division of Revenue and Enterprise Services is requiring the software providers to communicate with customers.

Disclosure and use of information language expectations

The following consent language must be added to electronic filing software to notify the user.

For Do-It-Yourself software:

By using a computer system and software to prepare and transmit return(s) electronically, I consent to the disclosure of all information pertaining to my use of the system and software to the State of New Jersey Division of Revenue and Enterprise Services, as applicable by law, and to the transmission of my tax return(s).

For Tax Professional software:

By using a computer system and software to prepare and transmit my client's return electronically, I consent to the disclosure of all information pertaining to my use of the system and software to create my client's return and to the electronic transmission of my client's tax return to the State of New Jersey Division of Revenue and Enterprise Services, as applicable by law.

For Business software:

By using a computer system and software to prepare and transmit this business return electronically, I consent to the disclosure of all information pertaining to the user of the system and software to create this business return and to the electronic transmission of this business tax return to State of New Jersey Division of Revenue and Enterprise Services.

Refund expectations

State of New Jersey Division of Revenue and Enterprise Services is providing a URL and/or a statement about refund processing. Industry partners must use this statement and/or URL or other method prescribed by the agency in all products. The messages must be shown to end-users within the software in a way to maximize the likelihood the message is read.

url: https://www20.state.nj.us/TYTR_TGI_INQ/jsp/prompt.jsp

Taxes due expectations

State of New Jersey Division of Revenue and Enterprise Services is providing a URL and/or a statement about taxes due, such as due dates and payment methods. Industry partners must use this statement and/or URL or other method prescribed by the agency in all products. The messages must be shown to end-users within the software in a way to maximize the likelihood the message is read.

URL: <https://www.state.nj.us/treasury/taxation/payments-notices.shtml>

Driver’s license/ID card expectations

State of New Jersey Division of Revenue and Enterprise Services is providing the following expectations and information: **For e-file returns:**

- State of New Jersey Division of Revenue and Enterprise Services requires the DL/ID card information be included with the tax return but will not reject the e-file return

Agency questions

This section represents questions State of New Jersey Division of Revenue and Enterprise Services has for the software provider about their product.

Specific Questions

1. Do you support unlinked jurisdictional returns?
 - a. Yes
 - b. No

2. What refund products or payment vehicles do you offer your customers? If you partner with an entity to provide refunds (e.g. Amazon.com or other pre-paid cards), please provide the names and bank routing numbers (RTNs) of each company. Attach a separate sheet if necessary.

Acknowledgments and signature

I agree to provide true, accurate, current, and complete information. By signing this agreement, my company agrees to all of the requirements listed in this document. The State of New Jersey Division of Revenue and Enterprise Services reserves the right to deny, suspend or terminate my company’s ability to submit returns.

AUTHORIZED REPRESENTATIVE PRINTED NAME	AUTHORIZED REPRESENTATIVE EMAIL ADDRESS	
AUTHORIZED REPRESENTATIVE SIGNATURE	AUTHORIZED REPRESENTATIVE PHONE NUMBER	DATE

Complete this signature line if this is an amended Letter of Intent

AUTHORIZED REPRESENTATIVE SIGNATURE	AUTHORIZED REPRESENTATIVE PHONE NUMBER	AMENDED DATE
-------------------------------------	--	--------------